

Calendar

The eWiSACWIS calendar can be used by workers to view their current, upcoming, and past due tasks. Including both system generated and worker entered (manual) tasks. For supervisors the calendar can also be used to manage their workers workload. For additional options available to supervisors please see the “For Supervisors” section at the end of this guide.

eWiSACWIS generated “Ticklers” display on the calendar as system generated tasks. For a full list of ticklers please see the User Guide titled “Tickler Creation and Removal Information”

Note: Currently Licensing Private Provider ticklers and the 90-Day Summary Report for Serious Incident tickler do not show on the calendar as tasks.

System Created Tasks

The following tasks show on the calendar and task list exclusively, they are not ticklers.

- Initial Face-to-Face – This task is created when a CPS Report is screened and shows as due based on the response time on the access report. This task is informational only and does not get marked as completed and does not show as overdue. This task is created for the primary worker and automatically shared with any workers with an assignment of CPS Initial Assessment – Secondary.
- Permanency Roundtable (PRT) Action Step – This task is created when a worker is assigned an action step on the permanency consultation page. The task is marked as complete when the action step has been marked as complete on the permanency consultation page.
- Reassign work: (Workers Name) – This task is created and assigned to a supervisor when one of their workers access is removed.
- Security Audit Due and Security Verification Due – These tasks are created every March and October for county security delegates.

Viewing the Calendar

To access the calendar, click the Icon next to the worker name on the desktop.

eWiSACWIS^{UAT}

Create Maintain Utilities Adoption Search Help

Richard J. Worker's Desktop

☒ Date Restricted ☐ Participant View ☐ View Not Approved/Cancelled

Ticklers

- My Ticklers
- Escalated Ticklers
- Cases (12)
- Providers (12)
- Approvals
- Access Reports
- Home Inquiries

The calendar opens in the week view:

eWiSACWIS

Refresh Print Help

View

☒ Tasks (System) ☒ Tasks (Manual) ☐ Events (Financial) ☐ Completed Tasks

today April 5 - 11, 2015

month week day

Sun 4/5	Mon 4/6	Tue 4/7	Wed 4/8	Thu 4/9	Fri 4/10	Sat 4/11
	eWiSACWIS Event					

And can be viewed by Day:

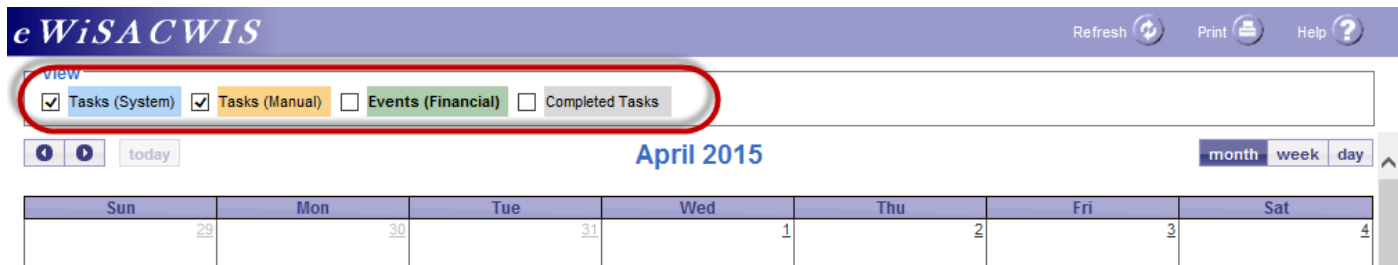
The screenshot shows the eWiSACWIS interface in 'Day' view for Monday, April 6, 2015. The 'View' section has 'Tasks (System)' and 'Tasks (Manual)' checked. The date selector shows 'April 6, 2015', and the view selector shows 'month', 'week', and 'day' options. The 'day' view is selected, showing a single day's events.

Or Month (clicking the number for any date will switch to the daily view for that day)

The screenshot shows the eWiSACWIS interface in 'Month' view for April 2015. The 'View' section has 'Tasks (System)' and 'Tasks (Manual)' checked. The date selector shows 'April 2015', and the view selector shows 'month', 'week', and 'day' options. The 'month' view is selected, showing a calendar grid for April 2015. A green arrow points to the 'Sun' header, and a text box explains the navigation controls.

Use the arrows to go to the previous or next month. Clicking today will bring you to the current month.

The View group box defaults to display system and manual tasks. Boxes can be selected to change the types of tasks that appear on the calendar.



Tasks are color coded:

- **Blue** - Tasks (system). Tasks generated by eWiSACWIS, such as ticklers. These are not editable through the calendar and are marked as completed after the associated tickler has been deleted.
 - An overdue task will have a red triangle with and exclamation
 - An informational only task will have a blue circle with the letter i.
- **Orange** – Tasks (Manual). Tasks created by the worker (or a supervisor). These are marked as complete by clicking on the task and entering a completed date.
- **Green** – Events (Financial). Display on days financial batch runs are scheduled to take place. Events are maintained by the State office.
- **Yellow** – Events (eWiSACWIS). Display for eWiSACWIS related events such as release dates and scheduled downtime. Events are maintained by the State office.
- **Grey** – Completed Tasks. Tasks that have been completed; a green check mark indicates the task was completed on time, a red check indicates it was completed late.



Below the calendar a section displays highlighting any overdue tasks in red.

Overdue Task List						
Due Date	Due In	Case/Provider Name	Participant(s) Name	Task Name	Responsible Worker	Shared With
08/08/10	-2020	Slacks, Mimmy J. (9222336)	N/A	IA Due	Worker, Richard J.	
09/17/10	-1980	Bumble, Bea (9222376)	N/A	IA Due	Worker, Richard J.	
09/17/10	-1980	Bumble, Bea (9222376)	N/A	IA Due	Worker, Richard J.	
04/02/11	-1783	Test, Case (9222418)	TEST, CANS (9227253)	Perm Plan Due	Worker, Richard J.	
05/21/11	-1734	Slacks, Mimmy J. (9222336)	Slacks, Max (9226536)	30-day CANS	Worker, Richard J.	
06/20/11	-1704	Slacks, Mimmy J. (9222336)	Slacks, Max (9226536)	Perm Plan Due	Worker, Richard J.	
08/01/11	-1662	Test, Case (9222418)	TEST, CANS (9227253)	Perm Plan Review	Worker, Richard J.	

[Task List](#) [Create Task](#) [Close](#)

Additionally, holding the cursor over any task will show the abbreviated details of the task.

Mon	Tue	Wed
1 ▲ Perm Plan Review Frost, Mom	2	
Case: Frost, Mom (9223680) Participant(s): Frost, Jack Responsible Worker: Supervisor, County Task Description: Case/Permanency Plan - Permanency Plan Review (6 months)		

Creating a Task

All workers can create Manual Tasks for themselves by clicking the Create Task link at the bottom of the page.

09/17/10	-1662	Bumble, Bea (9222376)	N/A	IA Due	Worker, Richard J.	
09/20/10	-1659	Bumble, Bea (9222376)	N/A	IA Due	Worker, Richard J.	
05/21/11	-1416	Slacks, Mimmy J. (9222336)	Slacks, Max (9226536)	30-day CANS	Worker, Richard J.	
01/11/13	-815	Worker, Betty (9221931)	Partridge, Christopher (10818)	CSE	Worker, Richard J.	

[Task List](#)
[Create Task](#)
[Close](#)

On the Task page, select the type of Manual Task (Case, Provider or Other), the Due/End Date, and enter the Task Name and Description. For a Manual Task (Case) or Manual Task (Provider) a dropdown menu of the worker's assigned cases or providers is available to select a specific case or provider. Clicking the Participant(s) link will bring up a pop up to select specific participants.

eWiSACWIS

[Print](#)
[Spell Check](#)
[Help](#)

Task Details

Type: Manual Task (Case)

Start Date: 00/00/0000

Task Name: Task 2

Description:

Case Name: Monster, Zoey E. (9221905)

[Participant\(s\)](#): N/A

Created On:

Completed On: 00/00/0000

Created By:

Completed By:

[Due/End Date:](#) 04/06/2015

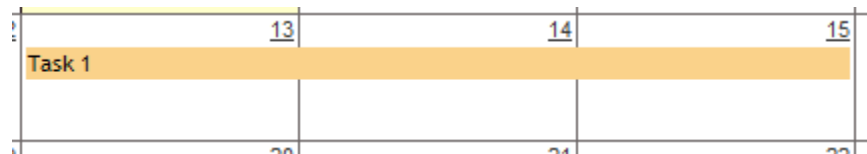
Worker Information

Responsible Worker: Worker, Richard J.

[Shared With:](#)

[Copy](#)
[Delete](#)
[Save](#)
[Close](#)

Note: The Start Date field is optional and can be used if a task or event stretches over multiple days.



The Completed On field is used to indicate when a particular task has been completed. Once a date is entered, and page saved, task displays as completed on the calendar.

Creating Recurring Tasks

Recurring tasks are tasks that can be set up to recur at regular intervals. They can be created to recur on daily, weekly, monthly or yearly basis. Workers can create recurring tasks by clicking on the recurring checkbox.

Note: The Type and Task Name inside the Task Details group box and the responsible worker dropdown in Worker Information group box are still required.

The screenshot displays the eWiSACWIS UAT web application interface. At the top, a purple header bar contains the logo 'eWiSACWIS UAT' and navigation links for 'Print', 'Spell Check', and 'Help'. Below the header, the 'Task Details' section is visible, featuring a 'Type' dropdown menu, a 'Task Name' text field, and a 'Description' text area. A red circle highlights the 'Recurring' checkbox, which is currently unchecked. To the right of the checkbox are labels for 'Created On:' and 'Created By:'. Below the Task Details section is the 'Worker Information' section, which includes a 'Responsible Worker' dropdown menu (currently set to 'Supervisor, County') and a 'My County's Workers' checkbox. A 'Shared With:' link is also present. At the bottom right, there are four buttons: 'Copy', 'Delete', 'Save', and 'Close'.

Task Details	
Type:	<input type="checkbox"/> Recurring
Task Name:	
Description:	

Worker Information	
Responsible Worker:	<input type="checkbox"/> My County's Workers
Shared With:	

Copy Delete Save Close

After a task has been set as Recurring the worker can pick Daily, Weekly, Monthly or Yearly. The Recurring Task Start Date and Recurring Task End Date control the date range that the recurring task will be created over. Daily, Weekly and Monthly tasks can be entered for a year into the future; yearly tasks can be entered for up to five years in the future.

For example, if a task is set to recur every weekday it will be created on each weekday that falls between the dates entered.

The example below shows a daily task, which can be set to show every day or only weekdays.

The screenshot shows a web application window titled "Task -- Webpage Dialog" with the "eWiSACWIS UAT" logo. The interface is divided into three main sections: Task Details, Worker Information, and Recurring Task Details.

Task Details: This section includes a "Type" dropdown menu set to "Manual Task (Other)", a checked "Recurring" checkbox, and fields for "Created On", "Created By", "Start Date", "Due/End Date", "Completed On", and "Completed By", all containing placeholder text "00/00/0000". The "Task Name" field contains the text "Task", and the "Description" field is empty.

Worker Information: This section includes a "Responsible Worker" dropdown menu set to "Supervisor, County", a checkbox for "My County's Workers" which is unchecked, and a "Shared With:" link.

Recurring Task Details: This section includes radio buttons for "Daily", "Weekly", "Monthly", and "Yearly", with "Daily" selected. It also includes fields for "Recurring Task Start Date" (02/17/2016) and "Recurring Task End Date" (04/17/2016), and radio buttons for "Every day" and "Every weekday", with "Every weekday" selected.

At the bottom right of the window, there are four buttons: "Copy", "Delete", "Save", and "Close".

After the page has been saved the Task Details and Worker Information can still be updated however the Recurring Task Details cannot.

The screenshot shows a web browser window titled "Task -- Webpage Dialog" with the eWiSACWIS UAT logo. The "Task Details" section includes a "Type" dropdown set to "Manual Task (Other)", a checked "Recurring" checkbox, and a "1 of 43" indicator. It also shows "Created On: 02/16/2016" and "Created By: Supervisor, County". The "Start Date" is "00/00/0000", "Due/End Date" is "02/17/2016", "Completed On" is "00/00/0000", and "Completed By" is empty. The "Task Name" is "Task" and the "Description" field is empty. The "Worker Information" section shows "Responsible Worker" as "Supervisor, County" and an unchecked "My County's Workers" checkbox. The "Recurring Task Details" section shows "Daily" selected, "Recurring Task Start Date" as "02/17/2016", and "Recurring Task End Date" as "04/17/2016". At the bottom are "Copy", "Delete", "Save", and "Close" buttons.

Weekly tasks allow the worker to set the task to display on a specific day of the week.

The screenshot shows the same web browser window, but the "Recurring Task Details" section is now configured for a weekly task. The "Type" dropdown is still "Manual Task (Other)", but the "Recurring" checkbox is unchecked. The "Start Date" is "00/00/0000", "Due/End Date" is "00/00/0000", "Completed On" is "00/00/0000", and "Completed By" is empty. The "Task Name" is empty and the "Description" field is empty. The "Worker Information" section remains the same. In the "Recurring Task Details" section, "Weekly" is selected, "Recurring Task Start Date" is "02/17/2016", and "Recurring Task End Date" is "03/17/2016". Below these, checkboxes for days of the week are shown: Sunday (unchecked), Monday (checked), Tuesday (unchecked), Wednesday (unchecked), Thursday (unchecked), Friday (unchecked), and Saturday (unchecked). At the bottom are "Copy", "Delete", "Save", and "Close" buttons.

Monthly tasks allow the worker to set the task to display on a specific day of the month:

The screenshot shows the 'Task -- Webpage Dialog' window for 'eWiSACWIS UAT'. The 'Task Details' section includes a dropdown for 'Type' set to 'Manual Task (Other)', a checked 'Recurring' checkbox, and empty date fields for 'Start Date', 'Due/End Date', 'Completed On', and 'Created On'. The 'Task Name' is 'task' and the 'Description' is 'description'. The 'Worker Information' section shows 'Responsible Worker' as 'Supervisor, County' and an unchecked 'My County's Workers' checkbox. The 'Recurring Task Details' section has radio buttons for 'Daily', 'Weekly', 'Monthly' (selected), and 'Yearly'. The 'Recurring Task Start Date' is '02/16/2016' and the 'Recurring Task End Date' is '04/17/2016'. The 'Day' is set to '01' of every month. At the bottom right are buttons for 'Copy', 'Delete', 'Save', and 'Close'.

Yearly tasks allow for a task to be created on a specific Month and Day each year.

This screenshot is identical to the one above, showing the 'Task -- Webpage Dialog' window. In this configuration, the 'Recurring Task Details' section has the 'Yearly' radio button selected instead of 'Monthly'. All other fields, including 'Task Name', 'Description', 'Worker Information', and dates, remain the same as in the previous screenshot.

For Supervisors:

Supervisors have additional options on the calendar to help with managing their workers workloads.

For the View supervisors see the following options:

- Escalated: - This option allows supervisors to choose whether or not ticklers escalated to them by workers display.
- Worker: - This drop down allows a supervisor to view any of their worker's calendars.
 - Selecting the value "All My Workers" will display all of the tasks for all workers that the supervisor is listed as supervisor for.
 - Selecting the value "Multi-Select Workers will pop up a page (see below) that allows the supervisor to select multi of their workers and/or any workers in the county to view tasks simultaneously.
- My County's Workers – Checking this box allows supervisors to see not only their own workers in the Workers: Dropdown, but all workers in their county.

eWiSACWIS Refresh Print Help

View

☒ Tasks (System) ☒ Tasks (Manual) ☐ Events (Financial) ☐ Completed Tasks

Escalated: Include Worker: Supervisor, County ☐ My County's Workers



today April 5 - 11, 2015 month week day

Sun 4/5	Mon 4/6	Tue 4/7	Wed 4/8	Thu 4/9	Fri 4/10	Sat 4/11
	eWiSACWIS Event					

Note: For Ticklers the responsible worker cannot be changed, the tickler would have to be reassigned; however the Shared With link can be used to share the task with multiple workers.

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The worker selection pop up page is used both for selecting workers whose calendar the supervisor would like to view and for selecting workers to share a task with.

eWiSACWIS UAT Print  Help 


My Workers

<input type="checkbox"/> Select All	Worker Name
<input type="checkbox"/>	DefaultWorker, Green
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	

This group box list all the workers that the supervisor is listed as supervisor for.

Additional Workers

Worker Name	Job Class
<div data-bbox="258 987 1263 1125" style="border: 1px solid black; padding: 10px; margin: 10px auto; width: fit-content;"><p><u>Clicking insert allows supervisors to select from a list of all the workers in their county.</u></p></div>	



Insert
Continue Close